STRATEGIC HEALTHCARE PROGRAMS

SHP Dashboard Updates:

Alert Management & PDGM Revenue





Zeb Clayton VP of Client Services

Doug Balser

Education Development Manager Winning Wednesday Webinar Series

SHP



Learning Objectives

- ✓ Overview of New Dashboard Tools
- ✓ Alert Management
 - Introduction to New Widgets
 - The New Alert Impact Report
 - Use Cases
- ✓ PDGM Revenue Review
 - Introduction to New Widgets
 - Use Cases





Navigating to the Dashboard Features

- Log in to SHP (<u>www.shpdata.com</u>)
- Click on the Dashboard option on the menu, then select one of the new views/tabs which have been added to your personal Dashboard

DASHBOARD	Alert Management: Overview A	Vert Manage	ement: Staff	Det C	DGM Revenu	e: Overview PDGM Revenue: S	taff Detail	3	-	+ -	
APPLICATIONS									3+	+	
REPORTS	Alert Trends: Critical & Potential Alert Description	6 Month	nths Last 12	Monthe	¢ ≁ ⊠ Trend	Critical & Potential Alert Counts Alert Description	1 Month		ast 12 Mo	othe	t 🖍
		Count	Last 12	womuts		Moderate or severe dyspnea but no	Count	Li	asi 12 M0		Trei
SEND DATA	Inappropriate use of symptom code Potentially unsafe behaviors to self or	11,508				Dx	847	Harr's	_	_ 11	
ADMIN TOOLS	others but n No assist needed but ADLs	11,298				Inappropriate use of symptom code Diabetes indicated in M1028, but no	830				
SHPUniversity™	contradict Patient indicated as chairfast but	6,772				Diabetes Dx Potentially unsafe behaviors to self of	742			_	
Sin University	Mobility indicated in M1028, but no					others but n Code Also: J44 to fully describe	6/0				
SUPPORT	Diabetes Dx Moderate or severe dyspnea but no	5,780			• •	condition this may	466				
	Able to groom self unaided but	5,628			_	Search:				Pr	evious N
	unable to access groo	5,292	Sep: 2,66	· _	+						
	Moderate or severe dyspnea but no Dx	5,042			+	Alert Summary by Provider - La		S Initical Aler	te	Potenti	¢ 🖌
	Diabetes indicated in M1028, but no Diabetes Dx	4,192			+	Provider				Open Clo	
	Primary Dx symptom control rating less than 2	3,629		n Ba.	. +	(11115) CARRILLO ST HH	90	49	10	353	386
	Code Also: J44 to fully describe condition this may	3,427			_	(11112) BATH ST HH	157	57	0	342	325
	Code First: L89 should be preceded by I96	2,979			L 🔶	(11113) HOLLISTER ST HH	47	85	2	407	494
	Mobility (sit-to-stand/bed-to- chair/walk 10ft) indep	2,617			. +	(11118) MILLS RD HH	79	124	17	383	537
	Able to groom self unaided but unable to access groo	2,564				(11120) CALIBRE RD HH	88	122	0	340	435
	Search:				Previous Next	Search:				Pr	evious N
	OASIS Accuracy Alerts by Provi			-	\$ 🎤 🖻	Coding Accuracy Alerts by Prov					* /
	Provider		tical Alerts Closed Dismis		ntial Alerts Closed Dismiss	Provider		Closed		Potenti Open Clo	al Alerts sed Disn
	(11113) HOLLISTER ST HH	80	34	9 246	236 42	(11112) BATH ST HH	16	32	4	204	283
	(11119) CHERRY ST HH	155	44	0 189	187 0	(11111) CASTILLO ST HH	15	5 42	0	230	268
	(11111) CASTILLO ST HH	38	72	2 149	270 6	(11116) OLIVE ST HH	17	55	2	342	387
	(11116) OLIVE ST HH	75	115 1	7 199	284 22	(11114) HALEY ST HH	15	5 <u>4</u> 9	3	267	395
	(11117) TELEGRAPH RD HH	80	108	0 173	271 0	(11120) CALIBRE RD HH	18	51	0	264	321
	Search:				Previous Next	Search:					evious N



Getting Started with the New Dashboard

Preset Views Available

- SHP has created new preset Dashboard views to help get you started with these new tools
- These views were created in collaboration with our clients to address the most commonly requested use cases not already covered by our Dashboard

URE PORTAL :: SHPS	olutions™ Dashboard											dis	splay())shpda
BOARD	Alert Management: Overview	Alert Mana	nomont: Et	off Dot	DD	CM Dava		Overview PDGM Revenue: Sta	off Dotail	3 ~				
CATIONS				all Deta	PU					¥ 88	+	a + 🔁	·	
RTS	Alert Trends: Critical & Potentia	- Last 6 M	1			* /		Critical & Potential Alert Counts	- Current I					/ 🗵
(15	Alert Description	Count	Last	12 Months	S	Trend	d	Alert Description	Count	La	st 12 Me	onths		Trend
DATA	Inappropriate use of symptom code	11,508			II.	. 1		Moderate or severe dyspnea but no Dx	847			_11		
TOOLS	Potentially unsafe behaviors to self or others but n	11,298				. 🔶		Inappropriate use of symptom code	830					
	No assist needed but ADLs contradict	6,772			II.	1		Diabetes indicated in M1028, but no Diabetes Dx	742			_	L	
niversity™	Patient indicated as chairfast but Mobility indicate	6,037				+		Potentially unsafe behaviors to self or others but n	678				L	
ORT	Diabetes indicated in M1028, but no Diabetes Dx	5,780		_		1		Code Also: J44 to fully describe condition this may	466					
	Moderate or severe dyspnea but no Dx	5,628				+		Search:					Previo	us Next
	Able to groom self unaided but unable to access groo	5,292	Sep: 2	2,663										
	Moderate or severe dyspnea but no Dx	5,042						Alert Summary by Provider - Las	st 3 Month	s			\$	/ 0
	Diabetes indicated in M1028, but no Diabetes Dx	4,192	India					Provider		Closed D		Pote Open	ential Al Closed	
	Primary Dx symptom control rating less than 2	3,629						(11115) CARRILLO ST HH	90	49	10	353	386	54
	Code Also: J44 to fully describe condition this may	3,427				•		(11112) BATH ST HH	157	57	0	342	325	0
	Code First: L89 should be preceded by I96	2,979				+		(11113) HOLLISTER ST HH	47	85	2	407	494	14
	Mobility (sit-to-stand/bed-to- chair/walk 10ft) indep	2,617						(11118) MILLS RD HH	79	124	17	383	537	40
	Able to groom self unaided but unable to access groo	2,564		_				(11120) CALIBRE RD HH	88	122	0	340	435	0
	Search:				P	revious Ne	ext	Search:					Previo	us Next
	OASIS Accuracy Alerts by Provi		3 Months ritical Alerts		Potenti	t 🖍		Coding Accuracy Alerts by Provi		3 Months ritical Alerts		Pote	¢ ential Al	r 🗉
	Provider	Open				osed Dism	iiss	Provider		Closed D				
	(11113) HOLLISTER ST HH	80	34	9 2	246	236	42	(11112) BATH ST HH	16	32	4	204	283	21
	(11119) CHERRY ST HH	155	44	0 1	189	187	0	(11111) CASTILLO ST HH	15	5 42	0	230	268	0
	(11111) CASTILLO ST HH	38	72	2 1	149	270	6	(11116) OLIVE ST HH	17	55	2	342	387	10
	(11116) OLIVE ST HH	75	115	17 1	199	284	22	(11114) HALEY ST HH	15	5 49	3	267	395	22
	(11117) TELEGRAPH RD HH	80	108	0 1	173	271	0	(11120) CALIBRE RD HH	18	51	0	264	321	0
	Search:				D	revious Ne	evt	Search:					Previo	us Next



Getting Started with the New Dashboard

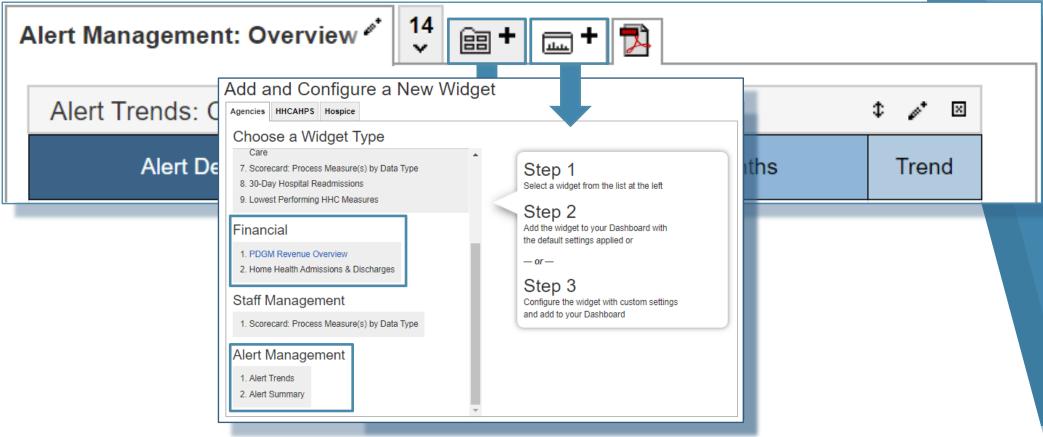
The New Preset Views Include:

- Alert Management: Staff Detail
- Alert Management: Overview
- PDGM Revenue: Staff Detail
- PDGM Revenue: Overview

REPORTS	Alert Trends: Critical & Potential Alert Description	6 Month Count	Last 12 Month		Trend	Critical & Potential Alert Counts - C Alert Description	Month		12 Mont	the	t / D	
	Inappropriate use of symptom code	Count 11,508			110110	Moderate or severe dysonea but no	Count 847	Last	112 1101		Heilu	
SEND DATA	Potentially unsafe behaviors to self or	11,298			-	Dx Inappropriate use of symptom code	830	lans.				
ADMIN TOOLS	others but n No assist needed but ADLs contradict	6,772			*	Diabetes indicated in M1028, but no Diabetes Dx	742					
SHPUniversity™	Patient indicated as chairfast but Mobility indicate	6,037				Potentially unsafe behaviors to self or others but n			Kani			
SUPPORT	Diabetes indicated in M1028, but no Diabetes Dx	5,780				Code Also: J44 to fully describe condition this may	466					
00.101	Moderate or severe dyspnea but no Dx	5,628	-		+	Search:					evious Next	
	Able to groom self unaided but unable to access groo	5,292	Sep: 2,663		4							
	Moderate or severe dyspnea but no Dx	5,042		-	+	Alert Summary by Provider - Last					* / 0	
	Diabetes indicated in M1028, but no Diabetes Dx	4,192	Instates		+	Provider		cal Alerts Closed Dit			al Alerts sed Dismiss	
	Primary Dx symptom control rating less than 2	3,629		lle i	+	(11115) CARRILLO ST HH	90	49			386 54	
	Code Also: J44 to fully describe condition this may	3,427			+	(11112) BATH ST HH	157	57	0	342	325 0	
	Code First: L89 should be preceded by I96	2,979			+	(11113) HOLLISTER ST HH	47	85	2	407	494 14	
	Mobility (sit-to-stand/bed-to- chair/walk 10ft) indep	2,617			+	(11118) MILLS RD HH	79	124	17	383	537 40	
	Able to groom self unaided but unable to access groo	2,564	_		+	(11120) CALIBRE RD HH	88	122	0	340	435 0	
	Search:			Previo	ous Next	Search				P	evious Next	
	OASIS Accuracy Alerts by Provid			\$ Potential A	ierte	Coding Accuracy Alerts by Provide		Months cal Alerts		Dotent	al Alerts	
	Provider	Open	Closed Dismiss Op	en Closed	Dismiss	Provider	Open (Closed Dis	smiss O	pen Cl	sed Dismiss	
	(11113) HOLLISTER ST HH	80		246 236		(11112) BATH ST HH	16	32			283 21	
	(11119) CHERRY ST HH	155		189 187		(11111) CASTILLO ST HH	15	42			268 0	
	(11111) CASTILLO ST HH	38		149 270		(11116) OLIVE ST HH	17	55			387 10	
	(11116) OLIVE ST HH	75		199 284		(11114) HALEY ST HH	15	49			395 22	
	(11117) TELEGRAPH RD HH	80	0 108 0	173 271		(11120) CALIBRE RD HH	18	51	0		321 0	
	Search:			Previo	ous Next	Search:				P	evious Next	

How to Add a New View or Widget

- Click on the "Add View" box to add a new view
- Click on the "Add Widget" box to add a widget to a view



Customizing Your Views and Widgets

Click on the wand on each widget to configure the details

Alert Management	: Overview 🇳	¹⁶ ♥ ⊞ +	□ + <mark>▶</mark>	Feedback?
Alert Trends: Cr	itical & Potentia	al - Last 3 N	lonths	\$ ≁ ⊠
Alert Des	cription	6 Month Count	Last 12 Months	Trend
	Enterprise Title Alert Trends: C Color	CAS ritical & Potential - I	Condet and a	et of alerts on which you ort. Update the title of the



Alert Management Views and Use Cases



New Alert Management Views

The Default Views below are available to all SHP users

Overview: High Level

Alert Trends: Critical & Potentia	al - Last 6 N	lonths	\$ /* 🗵	Critical &	Potential Alert Counts	- Current N	lonth			\$	e* [
Alert Description	6 Month Count	Last 12 Months	Trend	Ale	ert Description	1 Month Count	La	ast 12 Mo	onths	1	Frend
Inappropriate use of symptom code	2,308		•	Code Also: J condition this	44 to fully describe may	179				L	
Ambulation severity in conflict with transferring se	1,401		. +	Inappropriate	e use of symptom code	157				L	
Code Also: J44 to fully describe condition this may	1,313	_8.	•	Diabetes ind Diabetes Dx	icated in M1028, but no	120					
Potentially unsafe behaviors to self or others but n	1,066		. +	Ambulation stransferring	everity in conflict with	111				L	
No assist needed but ADLs contradict	1,023			PDGM Clinic Unacceptabl	al Group: Primary Dx e - No PD	82				.	
Diabetes indicated in M1028, but no Diabetes Dx	990		•	Search:						Previou	s Ne
Able to groom self unaided but unable to access groo	722		+								
PDGM Clinical Group: Primary Dx Jnacceptable - No PD	665	_8.	•	Alert Sum	mary by Provider - La						1
Moderate or severe dyspnea but no Dx	552	- 10.	•		Provider	Open	itical Aler Closed			ential Ale Closed	
CHF or COPD Dx but never short of preath	538		+	(11113) HOL	LISTER HH	289	310	55	1,035	1,338	3
Code First: L89 should be preceded by I96	490	_Ununu.		(11111) CAS	TILLO HH	63	37	5	234	229	
Primary Dx symptom control rating ess than 2	474			(11119) CHE	RRY HH	201	125	9	722	739	1
Nobility DC goal worse than SOC/ROC performance	449	ss-Realited.	•	(11115) CAF	RILLO HH	15	87	0	119	275	
Aftercare Dx but no surgical wound	441	I	+	(11116) OLIV	/E HH	24	86	1	140	299	
Search:			Previous Next	Search:						Previou	

Staff Detail: Specific

Critical & Potential Alert Counts	- Current N	1onth			\$	≠ ⊠	Alert Summary by Clinician - Las	st 3 Months	;			\$.	<i>i</i> 🛛
Alert Description	3 Month Count	La	ast 12 Mo	onths	т	Frend	Clinician		itical Alert Closed		Pote Open (ntial Aler Closed	
Code Also: J44 to fully describe condition this may	12,592					÷	AMIABLE, AMY	0	8	3	12	49	22
Inappropriate use of symptom code	11,114					CORDIAL, CHRISTINE		4	14	2	5	49	31
Potentially unsafe behaviors to self or others but n	7,955					+	DOTING, DANNY	1	9	3	4	48	32
Moderate or severe dyspnea but no Dx	6,564				1	.	HELPFUL, HENRY	5	10	4	15	89	45
Ambulation severity in conflict with transferring se	5,829				Previous	➡ s Next	SAMPLE, SAM Search:	2	7	1	9	49 Previous	21 Next
transferring se		Months			Previous	s Next			7	1	9		Next
transferring se Search:	er - Last 3 M	Months	ts			s Next	Search:	B Months	7 itical Alert			Previous	Next
transferring se Search:	ler - Last 3 l			Pote	¢ ential Aler	s Next	Search:	B Months		3		Previous \$	Next
transferring se Search:	ler - Last 3 l	ritical Aleri		Poter Open C	¢ ential Aler	s Next	Search:	B Months	itical Alert	3	Pote	Previous \$	Next
transferring se ' Search: Alert Summary by Case Manag Case Manager	ler - Last 3 I	itical Alert Closed I 1,258	Dismiss	Poter Open C	¢ ential Aler Closed [[s Next	Search: Alert Summary by Team - Last 3 Team	B Months	itical Alert Closed [s Iismiss	Pote Open (Previous tial Aler Closed E	Next
Alert Summary by Case Manag Case Manager (Not Assigned)	er - Last 3 l Ct Open 141	Itical Aler Closed I 1,258	Dismiss 847	Poter Open C 1,920	¢ ential Aler Closed [0 3,532	s Next	Search:Alert Summary by Team - Last 3 Team RED TEAM	B Months	itical Alert Closed [2 12	s Iismiss 8	Pote Open (14	Previous tial Aler Closed [2 33	Next
Alert Summary by Case Manag Case Manager (Not Assigned) CARLSON, CARLY	er - Last 3 I Open 141 0	itical Aleri Closed I 1,258 11 7	Dismiss 847 4	Poter Open C 1,920 4	tritial Aler Closed [3,532 58	s Next ts Dismiss 912 32	Search: Alert Summary by Team - Last 3 Team RED TEAM YELLOW TEAM	B Months	itical Alert Closed E 12 9	s iismiss 8 5	Pote Open (14 18	Previous t Intial Aler Closed [33 33	Next Next Is Is Is Is Is Is Is Is Is I

Color Coded Widgets to Stay Organized

Color		Alert Summary by Provider - Last	3 Months				\$	<i>µ</i> * ⊠
		Provider	Cr	itical Ale	rts	Pot	tential Ale	erts
Violet		Flovidei	Open	Closed	Dismiss	Open	Closed	Dismiss
Navy		(11115) CARRILLO ST HH	90	49	10	353	386	54
Blue Steel	$ \longrightarrow $	(11112) BATH ST HH	157	57	0	342	325	C
Aqua		(11113) HOLLISTER ST HH	47	85	2	407	494	14
Olive		(11118) MILLS RD HH	79	124	17	383	537	40
Umber Sienna		(11120) CALIBRE RD HH	88	122	0	340	435	C
Silver		Search:					Previou	us Next
Magnum								

OASIS Accuracy Alerts by Provider	- Last 3	Month	s		\$	<i>i</i> * 🗵			
Provider	Ci	itical Ale	rts	Pot	tential Al	erts			
Flovidei	Open	Closed	Dismiss	Open	Closed	Dismis			
(11113) HOLLISTER ST HH	80	34	9	246	236	42			
(11119) CHERRY ST HH	155	44	0	189	187	(
(11111) CASTILLO ST HH	38	72	2	149	270	(
(11116) OLIVE ST HH	75	115	17	199	284	22			
(11117) TELEGRAPH RD HH	80	108	0	173	271	(
Search:				Previous Nex					

Color	
Olive	\checkmark
Violet	
Navy	
Blue Steel	
Aqua	
Olive	
Umber	
Sienna	
Silver	
Magnum	

Case Manager	Cr	ritical Ale	rts	Pot	tential Ale	erts
	Open	Closed	Dismiss	Open	Closed	Dismis
HELPFUL, HENRY	45	26	20	64	42	32
SAMPLE, SAM	0	0	0	0	1	1
KYLE, KEVIN	1	1	0	10	4	2
CHAPLIN, CHARLIE	2	3	0	3	11	(
HOPEFUL, HELEN	1	22	0	8	70	(
Search:					Provio	us Next

Alert Management Customizations

- Within the widget customization box, select from a variety of options, including:
- Provider Level, Title, Color, Date Range, Alert Type, Alert Severity, Alert Status and Assessment Reason

Alert Summary by Clinician - Last 3	Months				\$	ø* ×
Clinician	Cr	itical Ale	rts	Pot	ential Al	erts
	Open	Closed	Dismiss	Open	Closed	Dismiss
AMIABLE, AMY	24	3	0	14	31	2
CORDIAL, CHRISTINE	17	10	1	25	34	4
KIND, KATRINA	17	1	0	26	32	9
LEONARD, LENNY	16	2	0	24	27	4
HELPFUL, HENRY	14	10	0	42	44	3
Search:					Previo	us Next

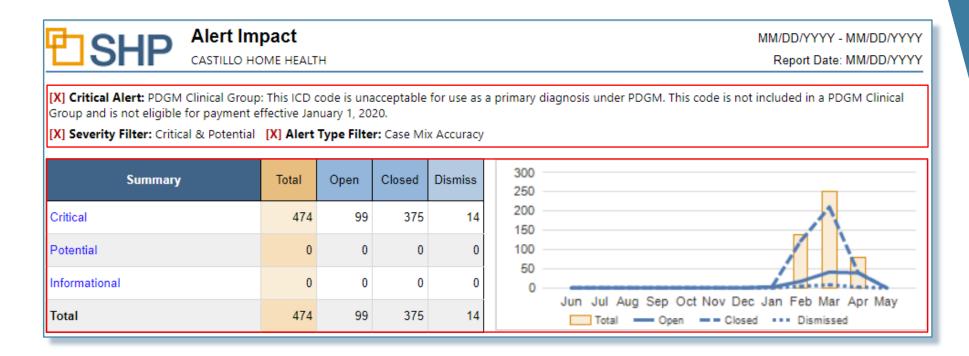
Alert Summary by Team - Last 3 Mo	onths				\$		
Team	Cr	itical Ale		Potential Alerts			
ream	Open	Closed	Dismiss	Open	Closed	Dismiss	
GOLD TEAM	11	18	1	62	48	18	
BLUE TEAM	6	11	0	39	29	11	
YELLOW TEAM	8	10	0	21	17	2	
ORANGE TEAM	0	0	0	2	0	0	
CHARCOAL TEAM	5	39	1	40	176	32	
Search:					Previo	us Next	

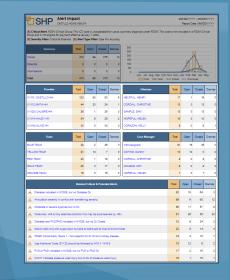
Introducing the NEW Alert Impact Report!

				•	н			М		YY - MM/Di ate: MM/Di	
Alert Management: Overview 💣 🛛	PDGM Rev	enue: Overview	 [X] Critical Alert: PDGM Clinical Group Group and is not eligible for payment [X] Severity Filter: Critical & Potential 	effective Jar	nuary 1, 2	020.		ode is not inc	cluded in a	PDGM Clin	nical
Alert Trends: Critical & Potential	- Last 3 M	lonths	Summary Critical Potential	Total 474 0	Open 91		300 260 200 150 100		1		
Alert Description	6 Month Count	Last 12 M	Informational Total Provider	0 474 Total			0 Jun Jul Aug Sep Oct			nissed	May
Ambulation severity in conflict with transferring se	1,114		(11111) CASTILLO HH (11112) BATH HH	103		0 53 5	HELPFUL, HENRY CORDIAL, CHRISTINE	17		16	0
Code Also: J44 to fully describe condition this may	845		(11120) CALIBRE HH (11114) HALEY HH (11116) OLIVE HH	36 34 30		1 35 0 9 25 2 0 30 0	SAMPLE, SAM HOPEFUL, HELEN CORAZON, KELLY	13 10 8	0 0 0	10	0
Diabetes indicated in M1028, but no Diabetes Dx	715		Team BLUE TEAM	Total 28	Open	Closed Dismiss 2 26 0	Case Manager (Not Assigned)	Total 61	Open 16		Dismiss 0
Able to groom self unaided but unable to access groo	697		YELLOW TEAM RED TEAM GOLD TEAM	21 20 20	1.	4 7 0 1 19 0 3 17 0	DOTING, DANNY CORDIAL, CHRISTINE AMIABLE, AMY	10	10		0
PDGM Clinical Group: Primary Dx Unacceptable - No PD			ORANGE TEAM	16		0 16 3	HOPEFUL, HELEN	7 Total	0 Open	7	-
2			 Diabetes indicated in M1028, but Ambulation severity in conflict w 	it no Diabe	es Dx			82	18	64 60	3
			Moderate or severe dyspnea bu Code Also: J44 to fully describe Diabetes and PVD/PAD indicate	condition t			i.e	68 61 33	11 26 9	57 35 24	9 20 2
			Able to walk only with supervision PDGM Comorbidity: Renal 1 - N	on but able	to bathe s	self at chair/sink/comn	node	22	8	14 15	4
			Use Additional Code: E11.22 sh PVD or PAD indicated in M1028 M1311 indicates pressure ulcer/	, but no P\	D or PAD) Dx		18 17 18	12 2 1	6 15 15	2

Alert Impact Drill-Down Report

- Alert Impact Detail report with filters applied
- Summary Section
- Trend Section





Alert Impact Drill-Down Report (Cont'd)

 Groupings for the Providers, Clinicians, Teams and Case Managers associated with the Selected Alert or Alert Category

Provider	Total	Open	Closed	Dismiss	Clinician	Total	Open	Closed	Dismiss
(11111) CASTILLO HH	103	50	53	5	HELPFUL, HENRY	17	1	16	0
(11112) BATH HH	44	20	24	1	CORDIAL, CHRISTINE	13	0	13	0
(11120) CALIBRE HH	36	1	35	0	SAMPLE, SAM	13	0	13	0
(11114) HALEY HH	34	9	25	2	HOPEFUL, HELEN	10	0	10	0
(11116) OLIVE HH	30	0	30	0	CORAZON, KELLY	8	0	8	1

Team	Total	Open	Closed	Dismiss	Case Manager	Total	Open	Closed	Dismiss
BLUE TEAM	28	2	26	0	(Not Assigned)	61	16	45	0
YELLOW TEAM	21	14	7	0	DOTING, DANNY	10	10	0	0
RED TEAM	20	1	19	0	CORDIAL, CHRISTINE	9	0	9	0
GOLD TEAM	20	3	17	0	AMIABLE, AMY	9	0	9	0
ORANGE TEAM	16	0	16	3	HOPEFUL, HELEN	7	0	7	0

	HOME HEALT							ate: MMC	om
(X) Critical Alerts POGM Clinical Gro Droup and Is not eligible for payment (X) Severity Filters Critical & Potentia	t effective Jan	uary 1, 20	20.		i primary diagnosis under POGM. This	code is not in	cluded in a	POGMIC	hiai
Summary	Total	Open	Closed	Dismiss	300 250				
Orisoal	474	99	375	14	200			1	
Potential	0	0	0	0	100		1		
informational	0	0	0	0	0 Jan Jal Aso Seo Oc		in.		>
Total	474	99	376	14	Total - Open				uay
Provider	Total	Open	Closed	Dismiss	Clinician	700	Open	Cosed	Dar
(11111) CASTILLO HH	103	50	53	5	HELPFUL HENRY	1		10	
(11112) DATH HH	44	20	24		CORDIAL, CHRISTINE	1		12	
(11120) CALIERE HH	20	1	35		SAVPLE, SAM	1		12	
(11114) HALEY HH	34	٥	25	2	HOPEPUL, HELEN	1	0	10	
(11118) OLIVE HH	30	٥	30	٥	CORAZON, KELLY				
Team	Total	Open	Closed	Dismiss	Case Manager	Total	Open	Cesed	0.p
BLUE TEAM	28	2	28		(Not Assigned)	61	18	45	
YELLOW TEAM	21	14	7	0	DOTINO, DANNY	1	10	0	
NED TEAM	20	1	19		CORDIAL CHRISTINE	4	• •		
GOLD TEAM	20	з	17	٥	AMABLE, ANY				
ORANGE TEAM	10	0	10	3	HOPEPUL, HELEN	1		7	
	Relate	d Critical	& Potentia	d Alerts		Total	Open	Closed	Disv
Diabetes indicated in M1028. 8	eut no Diabel	es Dx				82	18	64	
Ambulation severity in conflict	with transfer	ing several	v			00		60	
A Moderate or severe dysprea b	ut no Dx					68		67	
	e condition ti	nis may be	accompan	ried by 345		01	20	35	
Code Also: 344 to fully describ			Codes			33		24	
Code Also: J44 to fully describ Dabetes and PVD/PAD indica	9ed in M1028	, but no Di							
				sink/oomm	-	22	8	14	
Datates and PVDIPAD index	ion but able	lo bethe se	of at chair		xxe	22 19	8	14	
Disbetes and PVDIPAD indice Able to walk only with supervise	ion but able Non-specific	to bathe se Dx for div	eff at chairl onic kidne	disease	x0e				
Dabetes and PVDIPAD index Alte to walk only with supervis PDGM Controlidity: Renal 1-	ion but able Non-specific Hould be follo	to bathe se Dx for dvr pased by N	elf at chairl onic kidne 18.1 - N18	disease	**	19		15	

Alert Impact Drill-Down Report (Cont'd)

The "Related Critical and Potential Alerts" section shows the alerts that showed up the most frequently when the selected alert was also present

Related Critical & Potential Alerts	Total	Open	Closed	Dismiss
A Diabetes indicated in M1028, but no Diabetes Dx	82	18	64	3
Ambulation severity in conflict with transferring severity	69	9	60	12
A Moderate or severe dyspnea but no Dx	68	11	57	9
Code Also: J44 to fully describe condition this may be accompanied by J45	61	26	35	20
A Diabetes and PVD/PAD indicated in M1028, but no Dx Codes	33	9	24	2
Able to walk only with supervision but able to bathe self at chair/sink/commode	22	8	14	4
A PDGM Comorbidity: Renal 1 - Non-specific Dx for chronic kidney disease	19	4	15	7
△ Use Additional Code: E11.22 should be followed by N18.1 - N18.6	18	12	6	2
A PVD or PAD indicated in M1028, but no PVD or PAD Dx	17	2	15	2
A M1311 indicates pressure ulcer/injury but no Dx of pressure ulcer/injury	16	1	15	1

Saved Views in the Alert Manager

If there is an alert category that you would like to monitor, reach out to your SHP Customer Manager to set up a "Saved View" that shows patient detail data for a specified alert

Viewing Data: Castillo Home Health May 20 01:06 AM (4 Alert(s) for 11111	1)				
Providers Enterprise Castillo Home Health		-			
Manage By E-mail Alerts - Apr 15 01:06 AM (4 Alert(s) for 36789)	-				
Alert Status All	-			Resources My \	/iews
Options Reset Default Options				۵	m C
🔳 🕅 🎝 Group by Clinician 🔹			Tota	al Open Alerts ir	Results: 4
Clinician >> Assessment >> Alert		+ All 🙋 \$ 🔥	Status	🛃 🗘 Open	Closed
► AMIABLE, AMY		\$		3	0
► HELPFUL, HELEN		\$		1	0

Alert Management Use Case #1

- How can I review only my Open Critical and Potential Alerts?
- Steps to achieve the results
 - Navigate to or add the Alert Management:
 Overview (for a high level view) or the Alert
 Management: Staff Detail (for a Granular view)
 - 2) "Alert Summary by..." Provider, Clinician, Case Manager, Team, etc.
 - 3) Click on the "Open" header at the top of the column under Critical or Potential to sort in descending order

Provider	Cr	itical Ale	rts	Pot	ential Ale	erts
Flovidei	Open	Closed	Dismiss	Open	Closed	Dismiss
(11117) OLIVER HH	276	295	51	1,011	1,283	373
(11114) CHERRY HH	198	124	8	696	727	111
(11119) TELEGRAPH HH	53	37	5	222	219	68
(11120) BELFAST HH	52	97	40	219	487	264
(11130) ORANGE HH	25	65	5	90	307	79
Search:					Previou	us Next

Alert Management Use Case #2

- What are my most common alerts in the last 6 months?
- Steps to achieve the results
 - Navigate to or add the Alert Management: Overview (for a high level view) or the Alert Management: Staff Detail (for a Granular view)
 - 2) Review "Alert Trends: Critical & Potential – Last 6 Months". Under the "6 Month Count" column, you will be able to see the most frequent alerts for the level of the organization you've been granted access

lert Management: Overview ♂	Alert Mana	gement: Staff Deta	PDGM Revenu
Alert Trends: Critical & Potential	- Last 6 N	Ionths	\$ P* 🛛
Alert Description	6 Month Count	Last 12 Months	Trend
Inappropriate use of symptom code	2,288		•
Ambulation severity in conflict with transferring se	1,380		. +
Code Also: J44 to fully describe condition this may	1,288	_	•
Potentially unsafe behaviors to self or others but n	1,060		In_ 🕂
No assist needed but ADLs contradict	1,003		•
Diabetes indicated in M1028, but no Diabetes Dx	978	_	. *
Able to groom self unaided but unable to access groo	715		+
PDGM Clinical Group: Primary Dx Unacceptable - No PD	658	_	



PDGM Revenue Views and Use Cases



New PDGM Revenue Views

PDGM Revenue – Overview and Staff Detail

Overview:

PDGM Revenue by Provider						⊠ ∿ 1	Case Mix Alerts by Provider - Las						/* I
Provider	Period #	Cas Early	e Wt Late	Total Payment	Potential Revenue	Realized Revenue	Provider		Critical	Alerts ed Dis		Potential A n Closed	
(11111) CASTILLO HH	2,886	1.281	0.810	\$4.9M	\$39,385	\$30,323	(11111) CASTILLO HH	9	6	85	14 3	87 30	4 89
(11113) HOLLISTER HH	1,873	1.321	0.830	\$3.2M	\$29,334	\$36,102	(11116) OLIVE HH	1	6	6	0	82 5	0 10
(11115) CARRILLO HH	607	1.309	0.815	\$967K	\$12,344	\$7,834	(11118) MILLS HH	5	2	40	2 2	46 19	9 16
(11116) OLIVE HH	837	1.419	0.835	\$1.4M	\$7,823	\$31,350	(11117) TELEGRAPH HH		6	20	0	33 9	з (
(11119) CHERRY HH	715	1.336	0.866	\$1.3M	\$5,863	\$16,237	(11119) CHERRY HH		5	29	0	41 11	3 26
(11114) HALEY HH	798	1.309	0.801	\$1.2M	\$4,625	\$8,249	Search:					Previ	ous Next
(11118) MILLS HH	309	1.320	0.796	\$515K	\$4,479	\$7,620							
(11117) TELEGRAPH HH	499	1.400	0.879	\$881K	\$4,323	\$24,576	PDGM Revenue by Admit Src &	Timing - I	Last 3	Monti	าร	4	¢ 🖉
(11120) ASHWOOD HH	490	1.388	0.894	\$861K	\$4,083	\$21,004	Admit Source & Timing	Period #	Cas Early	e Wt Late	Total Payment	Potential Revenue	Realized Revenue
(11127) BALBOA HH	297	1.392	0.882	\$496K	\$3,916	\$11,509	Late - Community	1,888		0.821	\$2.6M	\$23,781	\$51,791
(11130) BELFAST HH	421	1.311	0.865	\$778K	\$3,801	\$21,497	Early - Institutional	610	1.409		\$1.4M	\$9,785	\$24,096
(11124) CAMPUS HH	466	1.352	0.855	\$809K	\$3,644	\$16,335	Early - Community	201	1.243		\$407K	\$4,080	\$5,139
(11125) CASITAS HH	458	1.375	0.849	\$826K	\$3,626	\$14,583	Late - Institutional	96		1.301	\$210K	\$595	\$4,231
(11123) CENTRAL HH	444	1.291	0.824	\$749K	\$3,265	\$11,028	(Not Assigned)	34					
						ous Next	Search:					_	ous Next

Staff Detail:

Case Mix Alerts by Provider -	Last 3 Mont	hs				\$ ₽ 🛛	PDGM Revenue by Provider -	Last 6 Mor	nths			:	¢ 🖋 🗉
Provider		Critical /		miss Op	Potential en Close	Alerts d Dismiss	Clinician	Period #	Cas Early	e Wt Late	Total Payment	Potential Revenue	Realized Revenue
(11111) CASTILLO HH	9	6	85	14	387 30	4 89	CARLSON, CARLY	91	1.403	0.912	\$177K	\$1,994	\$8,682
(11115) CARRILLO HH	1	6	6	0	82 5	i0 10	DOTING, DANNY	52	1.392	0.963	\$108K	\$1,965	\$4,098
(11119) CHERRY HH	5	2	40	2	246 19	9 16	CARA, SUZANNE	52	1.364	0.865	\$83,559	\$1,861	\$1,106
(11118) MILLS HH		6	20	0	33 9	3 0	LYNN, JENNIFER	25	1.213	0.719	\$35,139	\$1,563	\$0
(11130) BELFAST HH		5	29	0	41 11	3 26	HELPFUL, HENRY	36	1.375	0.859	\$57,640	\$1,498	\$1,908
Search:					Prev	ious Next	Search:					Previ	ous Next
	Leef 2 Mee	41						1	2.14-	- 41			
Search: PDGM Revenue by Clinician		ths	e Wt	Total		t / 0	PDGM Revenue by Case Man	<u> </u>			Total	;	¢ •
	- Last 3 Mon Period #			Total Paymen		¢ ≁ ⊠ Realized		ager - Last Period #		e Wt	Total Payment	;	t 💉 🗉 Realized
PDGM Revenue by Clinician	Period #	Case Early	Late		Potential Revenue	¢ ≁ ⊠ Realized	PDGM Revenue by Case Man	Period #	Cas Early	e Wt		Potential Revenue	t 💉 🗉 Realized
PDGM Revenue by Clinician Clinician MIABLE, AMY	Period # 21	Case Early 1.213	Late 0.719	Paymen	Potential Revenue \$1,563	¢ ≁ ⊠ Realized Revenue	PDGM Revenue by Case Man Case Manager	Period # 420	Cas Early 1.379	e Wt Late 0.927	Payment	Potential Revenue \$6,146	Realized Revenue
PDGM Revenue by Clinician Clinician	Period # 21 46	Case Early 1.213 1.411	Late 0.719 0.928	Paymen \$26,885	Potential Revenue \$1,563 \$1,514	Realized Revenue \$0 \$3,079	PDGM Revenue by Case Man Case Manager (Not Assigned)	Period # 420 24	Cas Early 1.379 1.316	e Wt Late 0.927 0.782	Payment \$702K	Potential Revenue \$6,146 \$1,727	Realized Revenue \$16,758
PDGM Revenue by Clinician Clinician MIABLE, AMY CARLSON, CARLY EE, ALLEN	Period # 21 46 20	Case Early 1.213 1.411 1.362	Late 0.719 0.928 0.810	Paymen \$26,885 \$84,526	Potential Revenue \$1,563 \$1,514 \$1,232	 Realized Revenue \$0 \$3,079 \$905 	PDGM Revenue by Case Man Case Manager (Not Assigned) CARLSON, CARLY	Period # 420 24 43	Cas Early 1.379 1.316 1.414	e Wt Late 0.927 0.782 0.879	\$702K \$33,345	Potential Revenue \$6,146 \$1,727	Realized Revenue \$16,758 \$0
PDGM Revenue by Clinician Clinician MIABLE, AMY CARLSON, CARLY	Period # 21 46 20 41	Case Early 1.213 1.411 1.362 1.228	Late 0.719 0.928 0.810 0.832	Paymen \$26,885 \$84,526 \$27,234	Potential Revenue \$1,563 \$1,514 \$1,232 \$1,073	 Realized Revenue \$0 \$3,079 \$905 	PDGM Revenue by Case Man Case Manager (Not Assigned) CARLSON, CARLY CORDIAL, CHRISTINE	Period # 420 24 43 30	Cas Early 1.379 1.316 1.414 1.382	e Wt Late 0.927 0.782 0.879 0.840	Payment \$702K \$33,345 \$71,245	\$6,146 \$1,727 \$1,093 \$973	Realized Revenue \$16,758 \$0 \$1,420

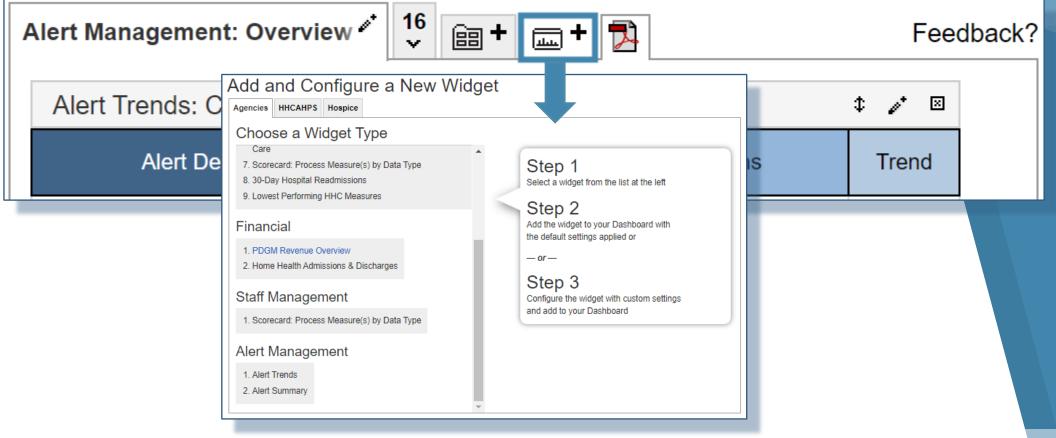
PDGM Revenue Use Case #1

Which Clinicians/Case Managers have the highest Potential or Realized Revenue associated with their patients?

PDGM Revenue by Clinician - Las	st 3 Mo	onths			\$	· 🏕 🗵
Clinician	Period	Cas	e Wt	Total	Potential	Realized
Chinichan	#	Early	Late	Payment	Revenue	Revenue
Amiable, Amy	134	1.383	0.947	\$234K	\$1,856	\$4,240
Helpful, Henry	236	1.488	0.946	\$431K	\$1,694	\$4,394
Cordial, Christine	52	1.428	0.967	\$170K	\$1,618	\$1,288
Sample, Sam	69	1.350	0.937	\$155K	\$1,534	\$0
Doting, Danny	83	1.369	0.916	\$111K	\$1,497	\$1,909
Search:					Previ	ous Next

PDGM Revenue Use Case #2

How do I configure the PDGM Revenue widget for different groups of Providers, Regions, Clinicians, etc?



PDGM Revenue Use Case #2 (Cont'd)

You can use the same widget for reporting on different provider groupings in your organization

Alert Summary by Provider, North D)ivision	Last 3	Months	6	\$	ø* ×
Provider	Cr	itical Ale	rts	Pot	tential Al	erts
Plovidei	Open	Closed	Dismiss	Open	Closed	Dismiss
(11117) OLIVER HH	178	310	55	1,035	1,338	389
(11114) CHERRY HH	63	37	5	234	229	73
(11119) TELEGRAPH HH	180	125	9	722	739	116
(11120) BELFAST HH	15	87	0	119	275	1
(11130) ORANGE HH	24	86	1	140	299	62
Search:					Previo	us Next

	Alert Summary by Provider	East Div	vision -	Last 3 I	Nonths		\$.∕* ⊠
	Provider		Critical Alerts			Potential Alerts		
			Open	Closed	Dismiss	Open	Closed	Dismiss
	(11116) IVY HH		180	302	52	900	1,305	381
	(11122) BORDER HH		176	37	5	225	229	73
	(11128) SPRINGBOK HH		170	124	8	602	730	112
	(11127) ELAND HH		80	87	0	116	270	1
	(11130) BLUE SKY HH		75	86	1	132	298	61
	Search:						Previo	us Next

Enterprise Division	East Division	
Region CCN Provider	Notes	

Practical Application of the Dashboard

- Spot the areas of importance across the enterprise
- Configure the Dashboard according to your needs
- New Dashboard widgets will allow you to stay on top of your most urgent opportunities for improvement





Questions for Internal Discussion

- Which Measures are Our Focus?
- How are We Doing with Assessing Our Performance?
- Which Case Managers are Our Top Performers?
- Do We Have Members of the Team Who Need Additional Training?
- Are We Meeting Our Long-Term Goals?
- How Will We Share This Information with Our Stakeholders?
- Do We Need More Training for SHP?



Use Case Questions Answered

Documents demonstrating how to use the Dashboard for the use cases below have been created and are attached to the Webinar as handouts:

- Alert Management: How can I review my open Critical and Potential alerts?
- Alert Management: What are my most common alerts in the last 6 months?
- PDGM: What clinician(s)/staff grouping(s) have the highest potential and realized revenue?
- All: What if I need to have multiple versions of the same view for different regions, or individual providers within my enterprise?
- Additional use case documents will be added as we obtain feedback and input from our users



Conclusion



Other New Resources

- COVID-19: SHP has released a number of specific COVID-19 report updates to help your organization deal with the changes resulting from this pandemic
- Client Data Export: If you're looking for additional analytics tools for Alert Management and PDGM, several new exports have been added the Client Data Export (CDE) tool
- New Scorecard Widget: This summer we will be adding a new Scorecard widget, stay tuned!

CLIENT DATA EXPORT

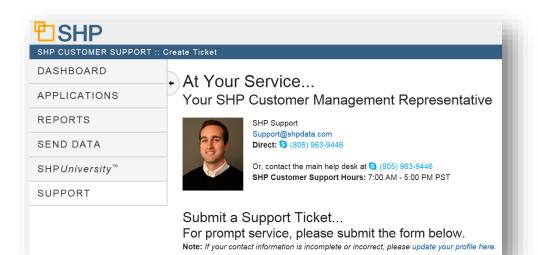
- Agencies
- → Alerts Aggregate
- → Clinical Measures Aggregate
- → Clinical Measures Benchmark
- → Clinical Measures Detail
- → HH Stay Aggregate
- → HH Stay Benchmark
- → HH Stay Detail
- → OASIS Assessment Detail
- → Payment Episodes Aggregate
- → Payment Episodes -Benchmark
- → Payment Episodes Detail
- → PDGM Period Measures -Aggregate by Period
- → PDGM Period Measures -Detail by Patient
- → PDGM Stay Measures -Aggregate by Stay
- → PDGM Stay Measures Detail by Patient

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We'd Love to Hear from You!

- As you begin using the Dashboard, let us know if you have use cases you've found valuable as you custom configure your widgets
- As always, don't hesitate to contact your SHP Customer Manager or our Support department with any questions or if you would like additional live training





STRATEGIC HEALTHCARE PROGRAMS

Thank you for attending!

Questions? Please Contact Us At:

Support@SHPdata.com

or call (805) 963-9446

